



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

Status RE: Terminate the Conservatorship based on the vacancy of the Conservator

		<p>JERRY DON HOOTON is Conservatee.</p> <p>JERRI ANN HOOTON and DONALD L. HOOTON, Parents, were appointed Limited Co-Conservators of the Person on 5/18/81.</p> <p>Mrs. Hooten passed away in 2012. Mr. Hooten also recently passed away.</p> <p>The Court set this status hearing re termination of the Limited Conservatorship due to the vacancy of the conservator and mailed notice to the Conservatee and to his brother, Donald Hooten.</p> <p>Court Investigator Samantha Henson filed a report on 6/10/16.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>	
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			w
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 8/17/16	
			Updates:	
			Recommendation:	
			File 1- Hooton	

Attorney Heather H. Kruthers (for Petitioner Public Administrator)

First Account and Report of Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for Distribution

DOD: 7/13/2014	PUBLIC ADMINISTRATOR , Administrator with Will Annexed, is Petitioner.	NEEDS/PROBLEMS/ COMMENTS:
	Account period: 8/22/2014 – 2/18/2016	
	Accounting - \$510,335.49	
Cont. from 062316	Beginning POH - \$495,712.14	
Aff.Sub.Wit.	Ending POH - \$370,553.24 (all cash)	
✓ Verified		
✓ Inventory	Administrator - \$12,497.28 (statutory)	
✓ PTC		
✓ Not.Cred.	Administrator X/O - \$2,100.85 (\$1,000.00 for sale of real property per Local Rule; \$852.85 for sale of personal property @ 10% of gross value; \$248.00 for preparation of tax returns @ 1 deputy hour @ \$96/hour and 2 clerk hours @ \$76/hour;)	
✓ Notice of Hrg		
✓ Aff.Mail	W/	
Aff.Pub.		
Sp.Ntc.	Attorney - \$12,497.28 (statutory)	
Pers.Serv.		
Conf. Screen	Costs - \$562.50 (filing fee, certified copies)	
Letters 011415		
Duties/Supp	Closing - \$2,000.00	
Objections	Bond Fee - \$1,913.76	
Video Receipt	Distribution pursuant to Decedent's Will is to:	
CI Report	<ul style="list-style-type: none"> • ARMENIAN GENERAL BENEVOLENT UNION, Fresno – \$169,273.29 cash; • ARMENIAN GENERAL BENEVOLENT UNION, New York – \$169,273.28 cash. 	
✓ 9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
✓ FTB Notice		
		Reviewed by: LEG
		Reviewed on: 8/18/16
		Updates:
		Recommendation:
		File 5- Paregian

First Account and Report of Executor for its Settlement

DOD: 1/23/15		WANDA JONES , Daughter and Executor with Full IAEA without bond, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Account period: 1/23/15 – 7/10/16 Accounting: \$228,427.51 Beginning POH: \$200,000.00 Ending POH: \$202,746.49 (Real property consisting of approx. 20 acres located at 7310 E. Floral Ave., in Selma plus \$2,746.49 cash)	Note: When distribution is requested in the future, the original assignments will need to be filed. (Only copies are provided with this petition.)
	Aff.Sub.Wit.	Petitioner states the real property remains unsold after three failed escrows. Distribution is impractical as there are 11 heirs of different fractional shares, which would make later sale a nightmare if distributed.	Note: The Court will set a status hearing for the filing of the second and final account and petition for final distribution as follows: • Tuesday, September 5, 2017
✓	Verified		
✓	Inventory	Petitioner states she received letters from two heirs assigning their interest to other heirs. Rickey Pierce assigned his 1/18 th share to his two children, Cheree Moynier and Rickey Pierce, II, and Debbie Hatcher assigned her 1/6 share to Petitioner.	
✓	PTC		
✓	Not.Cred.	Petitioner prays for an order: 1. That the first account presented herewith be settled and allowed; 2. That all acts and proceedings of Petitioner as personal representative be confirmed and approved; and 3. Such further orders as the Court deems proper.	
✓	Notice of Hrg		
✓	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters 5/4/15		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		

First Account and Report of Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for Partial Distribution

DOD: 12/19/14		PUBLIC ADMINISTRATOR is Petitioner.	NEEDS/PROBLEMS/COMMENTS: 1. Petitioner states two of the heirs' ages and addresses are unknown (Grandsons Joshua Garcia and Jordan Garcia), and the PA will hold their preliminary distribution shares and continue to look for them. It appears from the Notice of Hearing filed 7/29/16 that they have been located and sent notice at confidential addresses; however, their ages are not provided. Need clarification: If they are minors, need notice to their parent or guardian per Cal. Rule of Court 7.51, and clarification as to how their shares will be distributed. <u>Note:</u> The Court will set a status hearing for the filing of the second and final account and petition for final distribution as follows: • Tuesday, September 5, 2017
		Account period: 4/22/15 – 7/13/16	
		Accounting: \$468,626.40	
		Beginning POH: \$456,500.00	
		Ending POH: \$397,823.80 (Cash)	
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input checked="" type="checkbox"/>	Inventory		
<input checked="" type="checkbox"/>	PTC		
<input checked="" type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input checked="" type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input checked="" type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input checked="" type="checkbox"/>	FTB Notice		

- Maria Begonia Brownson: \$23,103.43 (1/8)
- Armando Garcia: \$23,103.43 (1/8)
- Johnny Garcia: \$23,103.43 (1/8)
- Richard Garcia: \$23,103.43 (1/8)
- Raul (Rudy) Garcia: \$23,103.43 (1/8)
- Jose Luis Garcia: \$23,103.43 (1/8)
- Drusilla Ruth Nieves Garcia: \$7,701.14 (1/24)
- Lorena Michelle Garcia: \$7,701.14 (1/24)
- Amelia Garcia: \$7,701.14 (1/24)
- Stephanie Marie Garcia: \$4,620.69 (1/40)
- Alexander Henry Garcia: \$4,620.69 (1/40)
- Monica Christina Garcia: \$4,620.69 (1/40)
- Joshua Henry Garcia: \$4,620.69 (1/40)
- Jordan Garcia: \$4,620.69 (1/40)

Reviewed by: skc

Reviewed on: 8/18/16

Updates:

Recommendation:

File 7- Garcia

First and Final Account and Report of Administrator and Petition for Allowance of Ordinary and Extraordinary Commissions and Fees and for Final Distribution of Insolvent Estate

DOD:1/21/15		PUBLIC ADMINISTRATOR is Petitioner.	NEEDS/PROBLEMS/COMMENTS:
	Aff.Sub.Wit.		
✓	Verified		
✓	Inventory		
✓	PTC		
✓	Not.Cred.		
✓	Notice of Hrg		
✓	Aff.Mail	w	
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
✓	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
✓	9202		
✓	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
✓	FTB Notice		
Account period: 5/21/15 – 6/19/16 Accounting: \$165,001.43 Beginning POH: \$165,000.00 Ending POH: \$ 47,328.26 (Cash)			
Public Administrator (Statutory): 5,947.05			
Public Administrator (Extraordinary): \$1,248.00 (for sale of real property per local rule and final estate tax return preparation and filing)			
Attorney (Statutory): \$5,947.05			
Bond fee: \$412.51			
Costs: \$946.50 (filing, processing)			
Closing: \$2,000.00			
Petitioner states the Department of Health Care Services filed a claim on 5/27/16 in the amount of \$43,652.54. After payment of commissions, fees and costs in the amount of \$16,502.01, Petitioner requests distribution of the remaining estate of \$30,826.25 to DHSC as partial payment of its claim.			
Reviewed by: skc			
Reviewed on: 8/18/16			
Updates:			
Recommendation:			
File 8- Ward			

Verified Petition for Accounting and for Order Instructing Co-Trustees and Compelling Final Distribution From Trust [Probate Code §§ 16062, 17200(b)(4), (5), and (6)]

Anna Hepner DOD: 4/24/08 Cont. from 060815, 072215, 091715, 121715, 021616, 032916, 060716, 072616		JERRY PRUDEK , Beneficiary, is Petitioner. Petitioner states GLENN J. HEPNER, JIMMY A. HEPNER, GEORGE HEPNER, JR., and DOLLIE SIMPSON have served as successor trustees since the death of their mother. The trust holds various acreage in Fresno County. Other assets are unknown. Petitioner alleges that the co-trustees have reviewed a proposal for distribution as set forth on Exhibit B. No action has been taken to effect such distribution due to lack of agreement among the co-trustees. The beneficiaries are Glenn J. Hepner, Jimmy A. Hepner, and George Hepner, Jr., each as to a 1/4 interest, and Dolly Simpson and Jerry Prudek each as to a 1/8 interest. Jerry Prudek is successor to Evelyn Prudek. Petitioner requests distribution in accordance with the First Amendments, which provides that "if my children are unable to agree on how the property is to managed or divided, then the property shall be sold and the proceeds divided in the proportions indicated above." Petitioner requests a full and complete accounting in accordance with Probate Code § 16063 pursuant to Probate Code § 16062, 16063, and 17200. Further administration of trust assets is not necessary, and the remaining assets should be liquidated and distributed.	NEEDS/PROBLEMS/COMMENTS: Minute Order 7/26/16: Counsel will be filing accounting. No appearance necessary if the accounting is filed at least two court days prior. (See Page B.) <ol style="list-style-type: none"> 1. Need order. 2. Other than the Stipulation to Continue Hearing filed 6/5/15 that indicated a mediation was scheduled that would include all five beneficiaries, no party other than Petitioner Jerry Prudek has made formal appearance in this matter or filed any opposition or other response. If this matter is to proceed with trial, the Court may require written response or appearance by all participating parties. 																																																																				
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 10%;"></td><td style="width: 80%;">Aff.Sub.Wit.</td><td style="width: 10%;"></td></tr> <tr><td style="text-align: center;">✓</td><td>Verified</td><td></td></tr> <tr><td></td><td>Inventory</td><td></td></tr> <tr><td></td><td>PTC</td><td></td></tr> <tr><td></td><td>Not.Cred.</td><td></td></tr> <tr><td style="text-align: center;">✓</td><td>Notice of Hrg</td><td></td></tr> <tr><td style="text-align: center;">✓</td><td>Aff.Mail</td><td style="text-align: center;">w</td></tr> <tr><td></td><td>Aff.Pub.</td><td></td></tr> <tr><td></td><td>Sp.Ntc.</td><td></td></tr> <tr><td></td><td>Pers.Serv.</td><td></td></tr> <tr><td></td><td>Conf. Screen</td><td></td></tr> <tr><td></td><td>Letters</td><td></td></tr> <tr><td></td><td>Duties/Supp</td><td></td></tr> <tr><td></td><td>Objections</td><td></td></tr> <tr><td></td><td>Video Receipt</td><td></td></tr> <tr><td></td><td>CI Report</td><td></td></tr> <tr><td></td><td>9202</td><td></td></tr> <tr><td></td><td>Order</td><td style="text-align: center;">x</td></tr> <tr><td></td><td>Aff. Posting</td><td></td></tr> <tr><td></td><td>Status Rpt</td><td></td></tr> <tr><td></td><td>UCCJEA</td><td></td></tr> <tr><td></td><td>Citation</td><td></td></tr> <tr><td></td><td>FTB Notice</td><td></td></tr> </table>		Aff.Sub.Wit.		✓	Verified			Inventory			PTC			Not.Cred.		✓	Notice of Hrg		✓	Aff.Mail	w		Aff.Pub.			Sp.Ntc.			Pers.Serv.			Conf. Screen			Letters			Duties/Supp			Objections			Video Receipt			CI Report			9202			Order	x		Aff. Posting			Status Rpt			UCCJEA			Citation			FTB Notice			Petitioner prays for relief against the co-trustees as follows: <ol style="list-style-type: none"> 1. An order compelling the successor trustees to account for any trust assets collected or received by them; 2. An order settling the accounts and passing upon the acts of each of the co-trustees; 3. An order determining to whom property shall pass or be delivered upon termination of the trust; 4. An order for termination of the trust; 5. For such other and further relief as the Court may deem just, equitable, and proper.
	Aff.Sub.Wit.																																																																						
✓	Verified																																																																						
	Inventory																																																																						
	PTC																																																																						
	Not.Cred.																																																																						
✓	Notice of Hrg																																																																						
✓	Aff.Mail	w																																																																					
	Aff.Pub.																																																																						
	Sp.Ntc.																																																																						
	Pers.Serv.																																																																						
	Conf. Screen																																																																						
	Letters																																																																						
	Duties/Supp																																																																						
	Objections																																																																						
	Video Receipt																																																																						
	CI Report																																																																						
	9202																																																																						
	Order	x																																																																					
	Aff. Posting																																																																						
	Status Rpt																																																																						
	UCCJEA																																																																						
	Citation																																																																						
	FTB Notice																																																																						
		<table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 100%;">Reviewed by: skc</td></tr> <tr><td>Reviewed on: 8/17/16</td></tr> <tr><td>Updates:</td></tr> <tr><td>Recommendation:</td></tr> <tr><td>File 9A - Hepner</td></tr> </table>	Reviewed by: skc	Reviewed on: 8/17/16	Updates:	Recommendation:	File 9A - Hepner																																																																
Reviewed by: skc																																																																							
Reviewed on: 8/17/16																																																																							
Updates:																																																																							
Recommendation:																																																																							
File 9A - Hepner																																																																							

Status RE: Filing of a Formal Accounting

Anna Hepner DOD: 4/24/08	<p>JERRY PRUDEK, Beneficiary, filed a Petition for Accounting and for Order Instructing Co-Trustees and Compelling Final Distribution from Trust on 4/22/16.</p> <p>No response or formal appearances have been made by other parties; however, it appears Attorney J. Stanley Teixeira represents Geln J. Hepner, George Hepner, Jr., and Jimmy A. Hepner (per Stipulation to Continue Hearing filed 6/5/15), and Dolly Simpson is separately represented by Attorney Lisa Horton (per Minute Order 3/29/16).</p> <p>On 3/29/16 at a status hearing re mediation and agreement, the Court continued the matter for further settlement attempts.</p> <p>At hearing on 6/7/16, the Court ordered that the required accounting be provided. Ms. Walters (specially appearing for Ms. Horton), requested 45 days.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Minute Order 7/26/16: Counsel will be filing accounting. No appearance necessary if the accounting is filed at least two court days prior. (See Page B.)</u></p> <p>1. Need account by trustees or written status report per Local Rule 7.5.</p>
Cont. from 072616		
<input type="checkbox"/> Aff.Sub.Wit.		
<input type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input type="checkbox"/> Notice of Hrg		
<input type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: skc
		Reviewed on: 8/17/16
		Updates:
		Recommendation:
		File 9B- Hepner

11 Marissa Castillo, Madisson Castillo, Meggan Castillo (GUARD/P)**Case No. 15CEPR00882****Petitioner Torres, Sandra Lee (Pro Per – Maternal Grandmother)****Petition for Appointment of Guardian of the Person**

Madisson Age: 12	<u>NO TEMPORARY REQUESTED</u> SANDRA TORRES , maternal grandmother, is petitioner. <u>Please see petition for details</u>	NEEDS/PROBLEMS/COMMENTS:
Marissa Age: 16		
Meggan Age: 11		
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.		
<input checked="" type="checkbox"/> Verified		
<input type="checkbox"/> Inventory		
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.		
<input checked="" type="checkbox"/> Notice of Hrg		
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input checked="" type="checkbox"/> Pers.Serv. w/		
<input checked="" type="checkbox"/> Conf. Screen		
<input checked="" type="checkbox"/> Letters		
<input checked="" type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report x		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input checked="" type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
Reviewed by: LV		
Reviewed on: 08/18/2016		
Updates:		
Recommendation:		
File 11- Castillo		

11

Petitioner Williams, Destiny (Pro Per – Mother)

Petition for Termination of Guardianship

Age: 1	DESTINY WILLIAMS, mother, is petitioner.	NEEDS/PROBLEMS/COMMENTS:
		Minute Order of 07/05/2016: Ms. Williams is to give the Court Investigator her contact information and follow up with them. This may be the last continuance, Examiner notes given.
Cont. from 070516		The following issues remain:
Aff.Sub.Wit.		
✓ Verified		1. Need Notice of Hearing.
Inventory		
PTC		2. Need proof of service fifteen (15) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Termination of Guardianship for:
Not.Cred.		
Notice of Hrg	x	<ul style="list-style-type: none"> Sandra Washington (Guardian) De'Andre Johnson, Sr. (Father) Bruce Johnson (Paternal Grandfather) Joann Givens (Paternal Grandmother) Michael Williams (Maternal Williams) Charlotte Dryer (Maternal Grandmother)
Aff.Mail	x	
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
✓ CI Report		
9202		
✓ Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: LV
		Reviewed on: 08/17/2016
		Updates:
		Recommendation:
		File 13- Johnson

Petition for Final Distribution on Waiver of Accounting and for Allowance of Statutory Commissions

DOD: 11/10/15		<p>KELLY JAMES MCCRORY, Son and Executor with Full IAEA without bond, is Petitioner.</p> <p>Accounting is waived</p> <p>I&A: \$393,136.76 POH: \$393,136.76 (a 50% interest in real property plus \$46,789.00 cash, vehicle, personal property, brokerage accounts)</p> <p>Executor (Statutory): Waives</p> <p>Attorney (Statutory): \$10,862.73</p> <p>Costs: \$1,691.35 (filing, publication, appraisal)</p> <p>Closing: \$1,000.00</p> <p>Distribution pursuant to Decedent's will:</p> <p>Julie Ann Napier: Decedent's 50% interest in certain real property</p> <p>Kelly James McCrory: One-half residue Matthew Allen McCrory: One-half residue</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need revised order pursuant to Local Rule 7.6.1.A, which requires monetary distributions be stated in dollars and not as a percentage of the estate.</p>	
	Aff.Sub.Wit.			
✓	Verified			
✓	Inventory			
✓	PTC			
✓	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail			W
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
✓	Letters			2/22/16
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
✓	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
✓	FTB Notice			
			<p>Reviewed by: skc</p> <p>Reviewed on: 8/18/16</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 15- McCrory</p>	

Petition for Appointment of Guardian of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS: <u>Note:</u> All receipts for the mailed notice re ICWA have been filed. <u>Minute Order 8/2/16:</u> The Court orders Petitioner to file the documents he brought today. 1. The proofs of service filed 8/2/16 indicate that the father and paternal grandparents were served with the ICWA forms and Letters of Temporary Guardianship; however, it does not appear that they were served with the Notice of Hearing and a copy of the Petition for Guardianship as required by Probate Code §1511. Therefore, it does not appear that they have been made aware of this continued hearing date or given a copy of the petition. As previously noted, need Notice of Hearing (mandatory Judicial Council Form GC-020) and proof of personal service of Notice of Hearing with a copy of the petition at least 15 days prior to the hearing Probate Code §1511 on father and personal or mailed service on the paternal grandparents.	
Cont. from 062116, 080216				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			X
	Aff.Mail			X
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			X
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
✓	Clearances			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: skc	
			Reviewed on: 8/17/16	
			Updates:	
			Recommendation:	
			File 16- Bill	

Petitioner Perez, Melissa Corine (Pro Per – Paternal Aunt)

Petition for Appointment of Guardian of the Person

Caylynn Age: 10 months			<p style="text-align: center;"><u>NO TEMPORARY REQUESTED</u></p> <p>CARLOS MORALES PEREZ, paternal uncle, and MELISSA CORINE PEREZ, paternal aunt, are petitioners.</p> <p style="text-align: center;"><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cayla Age: 3				
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg			
✓	Aff.Mail	w/		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.	n/a		
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			Reviewed by: LV	
			Reviewed on: 08/18/2016	
			Updates:	
			Recommendation:	
			File 18- Pineda	

Petition for Appointment of Guardian of the Person

Age: 13		<p><u>TEMPORARY EXPIRES 08/23/2016</u></p> <p>ANGELITA GARZA, non-relative, is petitioner</p> <p><u>Please see petition for details</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need <i>Notice of Hearing</i>.</p> <p>Note: A proof of personal service indicated the father was personally served, was filed on 07/01/2016 which includes the correct hearing date, time and department, but no <i>Notice of Hearing</i> has been filed. The proof of service does not have the required language contained in the <i>Notice of Hearing</i>.</p>	
Cont. from				
	Aff.Sub.Wit.			
✓	Verified			
	Inventory			
	PTC			
	Not.Cred.			
	Notice of Hrg			x
	Aff.Mail			
	Aff.Pub.			
	Sp.Ntc.			
✓	Pers.Serv.			w/
✓	Conf. Screen			
✓	Letters			
✓	Duties/Supp			
	Objections			
	Video Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			
	Status Rpt			
✓	UCCJEA			
	Citation			
	FTB Notice			
			<p>Reviewed by: LV</p> <p>Reviewed on: 08/18/2016</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 19- Navarrette</p>	

Petition to Determine Succession to Real Property

DOD: 5/15/09	ARTHUR RAY ELM, ANTHONY JAMES ELM, and DANIEL FORSTHOFF, Sons, are	NEEDS/PROBLEMS/COMMENTS:
	Petitioners.	
	40 days since DOD	
Cont. from		
<input type="checkbox"/> Aff.Sub.Wit.	No other proceedings	
<input checked="" type="checkbox"/> Verified		
<input checked="" type="checkbox"/> Inventory	I&A: \$70,000.00 (Real property located at 4741 E. Lowe in Fresno)	
<input type="checkbox"/> PTC		
<input type="checkbox"/> Not.Cred.	Decedent died intestate	
<input checked="" type="checkbox"/> Notice of Hrg	Petitioners request Court determination that the decedent's real property passes to them in one-third interests each.	
<input checked="" type="checkbox"/> Aff.Mail		
<input type="checkbox"/> Aff.Pub.		
<input type="checkbox"/> Sp.Ntc.		
<input type="checkbox"/> Pers.Serv.		
<input type="checkbox"/> Conf. Screen		
<input type="checkbox"/> Letters		
<input type="checkbox"/> Duties/Supp		
<input type="checkbox"/> Objections		
<input type="checkbox"/> Video Receipt		
<input type="checkbox"/> CI Report		
<input type="checkbox"/> 9202		
<input checked="" type="checkbox"/> Order		
<input type="checkbox"/> Aff. Posting		
<input type="checkbox"/> Status Rpt		
<input type="checkbox"/> UCCJEA		
<input type="checkbox"/> Citation		
<input type="checkbox"/> FTB Notice		
		Reviewed by: skc
		Reviewed on: 8/18/16
		Updates:
		Recommendation: SUBMITTED
		File 20- Elm

Petition to Determine Succession to Real Property

DOD: 3/14/14			KAREN M. LEE , Daughter, is Petitioner.	NEEDS/PROBLEMS/COMMENTS: Note: Under Probate Code §282, the interest disclaimed shall be distributed as if the disclaimant predeceased the creator of the interest. Under intestate succession, the disclaimants' shares would descend to their issue; however, pursuant to the will, if any beneficiary shall fail to survive the decedent, then the gift shall go to the others in equal shares. Therefore, Petitioner is the sole heir pursuant to the decedent's will and the disclaimers of her two siblings. 1. Need date of death of deceased spouse pursuant to Local Rule 7.1.1.D. 2. The Court may require continuance for proper notice to the alternate beneficiary Kathy Quinette Lee and named custodian Raymond Lee, or waiver of notice.
			40 days since DOD	
			No other proceedings	
	Aff.Sub.Wit.	s/p	I&A: \$100,000.00	
✓	Verified		(real property located at 2018 Mariposa Street in Kingsburg)	
✓	Inventory			
	PTC			
	Not.Cred.			
✓	Notice of Hrg		Decedent's Will dated 4/9/86 devises her estate as follows:	
✓	Aff.Mail	w	Vehicle to son Carrol D. Christensen; personal property to children in equal shares; option to purchase real property to daughter Karen Lee at fair market value; residue to three children Carrol D. Christensen, Kathy D. Christensen, and Karen M. Lee. If any beneficiary shall fail to survive the decedent, then the gift to that beneficiary shall go to the other beneficiaries in equal shares. If none survive, the will devises the residue to alternate beneficiary Kathy Quinette Lee, with her father Raymond Lee as custodian until age 21.	
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf. Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202		Carrol D. Christensen and Kathy D. Christensen have disclaimed their interest in the estate (Exhibit A).	
✓	Order		Petitioner therefore requests Court determination that the real property passes to her 100%.	
	Aff. Posting			
	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
Reviewed by: skc				
Reviewed on: 8/18/16				
Updates:				
Recommendation:				
File 21- Christensen				

22 Clarence Wyatt, Clarion Wyatt (GUARD/P) Case No. 16CEPR00779

Petitioner Robinson, Vernishay Marie (Pro Per – Paternal Aunt)

Petition for Appointment of Temporary Guardian of the Person

Clarence Age: 12	<u>TEMPORARY EXPIRES 08/23/2016</u>		NEEDS/PROBLEMS/COMMENTS:
Clarion Age: 11	<u>GENERAL HEARING 09/26/2016</u>		
VERNISHAY ROBINSON , paternal aunt, is petitioner.			Minute Order of 08/09/2016: The Court grants permission to notice Viginianne Mosely, mother, via Facebook or text message that includes all of the pertinent information, with proof of the message(s) being provided to the Court.
<u>Please see petition for details</u>			
Cont. from 080916			1. Need proof of personal service five (5) days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Temporary Guardian or consent and waiver of notice for: <ul style="list-style-type: none"> Viginianne M. Mosley (Mother) – Unless the Court dispenses with notice
<input type="checkbox"/> Aff.Sub.Wit.			
<input checked="" type="checkbox"/> Verified			Note: Notice of Hearing filed 08/15/2016 indicates <u>mailed</u> service to Virinianne M. Mosley on 08/12/2016; however, <u>personal</u> service is required. Declaration of Due Diligence also filed 08/15/2016 which includes Facebook Message.
<input type="checkbox"/> Inventory			
<input type="checkbox"/> PTC			Reviewed by: LV
<input type="checkbox"/> Not.Cred.			
<input checked="" type="checkbox"/> Notice of Hrg			Reviewed on: 08/17/2016
<input checked="" type="checkbox"/> Aff.Mail	w/		
<input type="checkbox"/> Aff.Pub.			Updates:
<input type="checkbox"/> Sp.Ntc.			
<input checked="" type="checkbox"/> Pers.Serv.	w/		Recommendation:
<input checked="" type="checkbox"/> Conf. Screen			
<input checked="" type="checkbox"/> Letters			File 22- Wyatt
<input checked="" type="checkbox"/> Duties/Supp			
<input type="checkbox"/> Objections			
<input type="checkbox"/> Video Receipt			
<input type="checkbox"/> CI Report			
<input type="checkbox"/> 9202			
<input checked="" type="checkbox"/> Order			
<input type="checkbox"/> Aff. Posting			
<input type="checkbox"/> Status Rpt			
<input checked="" type="checkbox"/> UCCJEA			
<input type="checkbox"/> Citation			
<input type="checkbox"/> FTB Notice			

Petition for Order Confirming Trust Assets

DOD: 1/18/09		<p>CHARLES TRANTHAM is Petitioner. Petitioner states he is the presently acting Trustee of the Nellie V. Trantham Family Trust dated 11/14/01. Settlor Nellie Trantham died 1/18/09.</p> <p>The trust names Charles Trantham, Nellie V. Trantham, Michael Bertelsen, Frank Parisi, and Bryan Parisi as trustees. Upon the death of Nellie V. Trantham, Petitioner agreed to serve as sole trustee. Michael Bertelsen, Frank Parisi, and Bryan Parisi declined to serve.</p> <p>Petitioner believes the trust declaration is valid and he is acting thereunder.</p> <p>At the time of execution of the trust, the settlor's residence address was 4915 E. Platt in Fresno, and she intended to transfer the real property to her trust as evidenced by a Grant Deed recorded 2/13/02.</p> <p>Petitioner is informed that the Fresno County Recorder and title companies will not recognize Petitioner as having right, title and control of the real property because the grantee of the settlor's deed is identified as the "Nellie V. Trantham Trust," rather than the trustee thereof.</p> <p>Therefore, Petitioner requests the Court confirm that the real property as an asset of the trust and is under the control of Petitioner as sole trustee.</p> <p>Contestant's Opposition to Petitioner's Request to Confirm House as a Trust Asset filed 8/1/16 by Cindy Busch states she is a granddaughter of Nellie V. Trantham, daughter of Mary Busch, who is the decedent's daughter. Mary died 5/7/16.</p> <p>Objector states she has lived in the house from 1984-1994 and from 2000-present. Her mother lived there from 1998-2016. Since 2000, she and her mother have paid all property taxes, insurance premiums, and repairs and maintenance on the property. Objector states she had an extremely close relationship with her grandmother, and she treated her as her daughter.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 8/15/16: Counsel request a week to discuss resolution.</p> <p><u>SEE ADDITIONAL PAGES</u></p>
Cont. from 081516			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input checked="" type="checkbox"/>	Verified		
<input type="checkbox"/>	Inventory		
<input type="checkbox"/>	PTC		
<input type="checkbox"/>	Not.Cred.		
<input checked="" type="checkbox"/>	Notice of Hrg		
<input checked="" type="checkbox"/>	Aff.Mail w/o		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
<input type="checkbox"/>	Pers.Serv.		
<input type="checkbox"/>	Conf. Screen		
<input type="checkbox"/>	Letters		
<input type="checkbox"/>	Duties/Supp		
<input checked="" type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
<input type="checkbox"/>	9202		
<input checked="" type="checkbox"/>	Order		
<input type="checkbox"/>	Aff. Posting		
<input type="checkbox"/>	Status Rpt		
<input type="checkbox"/>	UCCJEA		
<input type="checkbox"/>	Citation		
<input type="checkbox"/>	FTB Notice		

SEE ADDITIONAL PAGES

Page 2 – Objection (Cont'd): Objector has some issues with the alleged trust presented to the Court by Petitioner. Objector states the signature attributed to her grandmother is not hers. See attached Exhibit 1 which represents her grandmother's signature on her driver's license and her signature on a patient agreement form. Those are her signatures, and they do not appear to be the same as the signature on the alleged trust. Frank Parisi's, Brian Parisi's, and Michael Parisi's signatures on the trust do not match the signatures on the declination document. None of the signatures in the alleged trust are dated. Objector states she never would have named non-relatives as trustees.

Objector states her grandmother owned the real property on Platt since 1973, and if she would have intended the property to be placed in trust, she would have done so. The deed that has "trust" written on it was signed by the Petitioner. The deed that allegedly placed the real property in trust was written by the petitioner. Again, the signature on the grant deed was not the decedent Nellie Trantham's signature. In fact, the signature on the alleged deed was signed two (2) days after the county stamped such.

A deed to the decedent Nellie V. Trantham's property in 7/16/01 has no mention of a trust. The trust has never paid any property taxes, insurance or maintenance on the house. As stated previously, Objector and her mother have paid all expenses on the house since 2009. When the decedent was alive, she made all her payments from a personal account shared with Objector's mother, Mary Busch.

Objector states Petitioner transferred the property to himself and to his wife's name so they could borrow \$100,000 against the house and to Objector's knowledge, that loan has never been paid. He has also borrowed \$6,000 from the decedent in November 2008.

Objector states she has only recently been given a copy of the alleged trust. Her mother nor the decedent never received a copy of the trust. Most of the beneficiaries have never seen the trust document. The only reason she received a copy was because she requested such via letter.

The alleged trust was created in 2001 and there has never been an accounting done by the petitioner who is the trustee and the beneficiaries. Petitioner has never given beneficiaries any information regarding the property in the alleged trust.

Objector states Petitioner has never done anything to benefit the decedent. He has taken advantage of her financially most of her life. He used the \$100,000 from the Platt residence to build his own residence. He's always dealt with the decedent in a self-serving manner.

Objector believes Petitioner has performed his duties as trustee to serve himself and not the decedent. Objector states she has always been close to the decedent and believes she could best serve the estate. Her grandmother trusted her judgment and treated her with utmost respect. Prior to the death she and petitioner had no relationship.

The following items are attached to the objection:

- a copy of the decedent's driver's license
- a copy of a patient form
- a copy of Page 18 of the alleged trust
- copies of the declinations to serve as co-trustees
- a copy of the signature page only of a will dated 1/12/09, with witness signatures by Robert Trantham, Mike Bertelsen, and Jimmie Smith
- Copy of deed with copy of driver's license
- Copy of 7/16/01 deed from grantors Charles E. Trantham and Debbie J. Trantham to Nellie V. Trantham.

Note: The objection does not appear to contain any prayer for relief.

Declaration filed 8/12/16 provides copies of the "Beneficial Interest Certificates" and states the beneficiaries of the trust are Robert Trantham 67% and Mary Busch 33%.

Response to Objection filed 8/12/16 states the decedent's signature on the trust and the deed, and the trustees' signatures, were notarized. The trust is dated 11/14/01 at Section 2.1 and accords with the dated notary acknowledgments. Objector states a deed dated 7/16/01 contains no mention of a trust. This is because the trust was not created until 11/14/01.

Petitioner states all of the decedent's children were provided with a copy of the trust, but it is impossible to account for what may have happened to Objector's mother's copy in the intervening years. Objector's other allegations are irrelevant as to confirming the property to the trust; therefore, no comment will be made.